

Add Expertise

Add/Update Expertise

In order for members to easily find other members focused in a certain area of expertise, **please select up to 10 (and no more than 5 per service line).**

Accounting

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|---|--|---|---|
| <input type="checkbox"/> Accounting Services | <input type="checkbox"/> Accounting Systems Implementation | <input type="checkbox"/> Bookkeeping | <input type="checkbox"/> CFO/Controller Services |
| <input type="checkbox"/> Financial Management | <input type="checkbox"/> Financial Modeling/Planning | <input type="checkbox"/> Financial Performance Analysis | <input type="checkbox"/> Financial Statements Preparation |
| <input type="checkbox"/> Grant Accounting | <input type="checkbox"/> IFRS Compliance | <input type="checkbox"/> Lease Accounting | <input type="checkbox"/> Outsourced Accounting |
| <input type="checkbox"/> Proforma Financial Information | <input type="checkbox"/> Small Business Accounting | | |

Advisory/Consulting

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| <input type="checkbox"/> Affordable Care Act | <input type="checkbox"/> Affordable Housing Services | <input type="checkbox"/> Bank Financing | <input type="checkbox"/> Bankruptcy |
| <input type="checkbox"/> Business Advisory & Consulting | <input type="checkbox"/> Business Insurance Claims | <input type="checkbox"/> Business Process & Internal Controls Performance Consulting | <input type="checkbox"/> Business Process & IT Advisory |
| <input type="checkbox"/> Business Process Improvement | <input type="checkbox"/> Business Succession Plan | <input type="checkbox"/> Business Technology Consulting | <input type="checkbox"/> Business Transaction Advisory |
| <input type="checkbox"/> Business Valuation | <input type="checkbox"/> Cash Flow Analysis | <input type="checkbox"/> Charitable Foundation Services | <input type="checkbox"/> Contract Negotiations |
| <input type="checkbox"/> Corporate Finance | <input type="checkbox"/> Customs Valuation | <input type="checkbox"/> Data Privacy | <input type="checkbox"/> Debt Advisory |
| <input type="checkbox"/> Dispute Advisory | <input type="checkbox"/> Divestitures and Carve-outs | <input type="checkbox"/> Divorce Finance Services | <input type="checkbox"/> Employee Stock Ownership Plans (ESOPs) |
| <input type="checkbox"/> Entity Structuring/Planning | <input type="checkbox"/> Entrepreneurial Operating System (EOS) | <input type="checkbox"/> Financial Advisory | <input type="checkbox"/> Financial Forecasts and Projections Consulting |
| <input type="checkbox"/> Financial System Software Consulting | <input type="checkbox"/> Financing Consulting | <input type="checkbox"/> Healthcare Consulting & Reimbursement | <input type="checkbox"/> IFRS Conversion Consulting |
| <input type="checkbox"/> Insurance Services | <input type="checkbox"/> Intangible Analysis | <input type="checkbox"/> Internal Audit Advisory | <input type="checkbox"/> Investment Banking |
| <input type="checkbox"/> Litigation Support | <input type="checkbox"/> Loan Review Outsourcing | <input type="checkbox"/> Managed Accounting Solutions | <input type="checkbox"/> Marketing & Communications |
| <input type="checkbox"/> Mergers and Acquisitions | <input type="checkbox"/> Nonprofit Management Consulting | <input type="checkbox"/> PPP Loan Forgiveness Consulting | <input type="checkbox"/> Process Improvement Reviews |
| <input type="checkbox"/> Purchase Price Allocation | <input type="checkbox"/> Quality of Earnings | <input type="checkbox"/> Real Estate Development & Analysis | <input type="checkbox"/> Regulatory, Quality & Compliance |
| <input type="checkbox"/> Retirement Plan Services | <input type="checkbox"/> Retirement Plan Sponsors | <input type="checkbox"/> Risk Advisory | <input type="checkbox"/> SBA Financing |
| <input type="checkbox"/> Small Business Consulting | <input type="checkbox"/> Socially Responsible Investing (SRI) | <input type="checkbox"/> Software/Hardware Consulting | <input type="checkbox"/> SPAC (Special Purpose Acquisition Company) |
| <input type="checkbox"/> Stock-based Compensation | <input type="checkbox"/> Strategic Planning | <input type="checkbox"/> Supply Chain | <input type="checkbox"/> System Selection & Implementation |
| <input type="checkbox"/> Team Building: Kolbe Assessments | <input type="checkbox"/> Technical Accounting Advisory | <input type="checkbox"/> Third Party Risk Assessment | <input type="checkbox"/> Title IV Audit and Consulting |
| <input type="checkbox"/> Transaction Advisory | <input type="checkbox"/> Transactional Consulting/Planning | <input type="checkbox"/> Transition Planning | <input type="checkbox"/> Transport Advisory |
| <input type="checkbox"/> Unclaimed Property Consulting & Compliance | <input type="checkbox"/> Voluntary Disclosure Programs | <input type="checkbox"/> Wealth Advisory & Financial Planning | <input type="checkbox"/> Working Capital Evaluation Assistance |

Audit & Assurance

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| <input type="checkbox"/> Accounting Method Review | <input type="checkbox"/> Agreed Upon Procedures | <input type="checkbox"/> Assistance with Business Loans | <input type="checkbox"/> Attest |
| <input type="checkbox"/> Audit | <input type="checkbox"/> Audit Assistance | <input type="checkbox"/> Business Assurance | <input type="checkbox"/> Directors' Examinations |
| <input type="checkbox"/> Employee Benefit Plan Audit & Consulting | <input type="checkbox"/> Enterprise Risk Management | <input type="checkbox"/> Environmental, Social & Governance (ESG) Reporting/Sustainability Assurance | <input type="checkbox"/> Exams of Securities Held by Trustees |
| <input type="checkbox"/> Federal Financial Institutions Examination Council (FFIEC) Compliance | <input type="checkbox"/> Federal Information System Security Management Act (FISMA) Compliance | <input type="checkbox"/> Field Audits of Behalf of Banks | <input type="checkbox"/> Financial Reporting |
| <input type="checkbox"/> Financial Statement Audit | <input type="checkbox"/> Fraud Prevention & Investigations | <input type="checkbox"/> GASB Implementation | <input type="checkbox"/> Internal Audit Outsourcing |
| <input type="checkbox"/> Internal Control & Compliance Audits | <input type="checkbox"/> Internal Control Analysis/Reviews | <input type="checkbox"/> International Financial Reporting | <input type="checkbox"/> Nonprofit Audit |
| <input type="checkbox"/> PCAOB Reporting | <input type="checkbox"/> Peer Reviews | <input type="checkbox"/> Pension Audits | <input type="checkbox"/> Qualified Retirement Plan Audits |
| <input type="checkbox"/> Regulatory & Agency Audits | <input type="checkbox"/> Repair vs. Capitalization Review | <input type="checkbox"/> Retirement Plan Audits | <input type="checkbox"/> Reviews & Compilations |
| <input type="checkbox"/> Risk Management Evaluation | <input type="checkbox"/> SOC Reports | <input type="checkbox"/> SOX Compliance | <input type="checkbox"/> SSPA Attestation |
| <input type="checkbox"/> Title IV Audit | <input type="checkbox"/> Uniform Financial Statements & Independent Auditor's Report (UFR) | <input type="checkbox"/> Uniform Guidance/Single Audit | <input type="checkbox"/> Yellowbook (Government) Audits |

Forensic & Valuation

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| <input type="checkbox"/> Bankruptcy & Receivership | <input type="checkbox"/> Family Law & Mediation Services | <input type="checkbox"/> Forensic & Valuation | <input type="checkbox"/> Forensic Accounting |
| <input type="checkbox"/> Fraud Examinations | <input type="checkbox"/> Lost Profits & Economic Damages | | |

Governance and Secretarial

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| <input type="checkbox"/> Board Support and Minutes | <input type="checkbox"/> Corporate Governance Advisory | <input type="checkbox"/> Corporate Secretarial Advisory | <input type="checkbox"/> Entity Formation |
| <input type="checkbox"/> Governance Consulting | <input type="checkbox"/> Holding Company Services | <input type="checkbox"/> Statutory Compliance | <input type="checkbox"/> Trademark and Patent Services |

Human Resources & Payroll

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| <input type="checkbox"/> Benefits & Compensation | <input type="checkbox"/> Compensation Surveys | <input type="checkbox"/> Compliance and Industrial Relations | <input type="checkbox"/> Deferred Compensation Plans |
| <input type="checkbox"/> Employee Communication Program | <input type="checkbox"/> Employee Satisfaction | <input type="checkbox"/> ERISA | <input type="checkbox"/> Health & Safety |
| <input type="checkbox"/> HR Advisory Services | <input type="checkbox"/> HR Audit, Policies and Procedures | <input type="checkbox"/> HR Compliance | <input type="checkbox"/> HR Information Systems |
| <input type="checkbox"/> HR Outsourcing | <input type="checkbox"/> HR Strategy - Planning and Projection | <input type="checkbox"/> Human Capital Management | <input type="checkbox"/> Human Capital Management System |
| <input type="checkbox"/> Human Capital Strategies | <input type="checkbox"/> Incentive Plans | <input type="checkbox"/> Payroll Management | <input type="checkbox"/> Payroll Outsourcing |
| <input type="checkbox"/> Payroll Tax & Statutory Compliance | <input type="checkbox"/> Recruitment and Selection | <input type="checkbox"/> Retrenchment, Severance, and Outplacement Advisory | <input type="checkbox"/> Training and Development |
| <input type="checkbox"/> Voluntary Benefits | <input type="checkbox"/> Work Pass/Permit/Application | | |

Incorporation & Entity Setup

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| <input type="checkbox"/> Business Formation | <input type="checkbox"/> Legal Entity Analysis and Selection | <input type="checkbox"/> License Applications |
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Insolvency/Liquidation/Judicial Management☐ Insolvency and Restructuring**Public Company**

<input type="checkbox"/> 404 Compliance and Implementation	<input type="checkbox"/> IFRS Consulting	<input type="checkbox"/> Initial Public Offering (IPO)	<input type="checkbox"/> IPO and Capital Raising Readiness
<input type="checkbox"/> SEC Quarterly and Annual Reports	<input type="checkbox"/> SEC Rules & Regs	<input type="checkbox"/> XBRL	

Tax Planning & Compliance

<input type="checkbox"/> Accounting for Income Taxes	<input type="checkbox"/> Accounting Methods Changes	<input type="checkbox"/> Business Tax	<input type="checkbox"/> Charitable Trust Returns
<input type="checkbox"/> Cost Segregation Studies	<input type="checkbox"/> Cryptocurrency Tax Services	<input type="checkbox"/> Employee Retention Tax Credit Consulting	<input type="checkbox"/> Estate and Gift Tax Planning
<input type="checkbox"/> Expatriate Tax	<input type="checkbox"/> Federal and State Tax Preparation	<input type="checkbox"/> Fringe Benefits	<input type="checkbox"/> Golden Parachute Calculation
<input type="checkbox"/> Goods and Services Tax (GST)	<input type="checkbox"/> Green Building Tax Incentives	<input type="checkbox"/> Historic Rehabilitation Tax Credits	<input type="checkbox"/> IC-DISC Studies
<input type="checkbox"/> Income Tax	<input type="checkbox"/> Individual, Family and Fiduciary Tax	<input type="checkbox"/> International Tax	<input type="checkbox"/> Nexus Determination
<input type="checkbox"/> Nonprofit Tax	<input type="checkbox"/> Opportunity Zones	<input type="checkbox"/> Payroll Tax Preparation	<input type="checkbox"/> Personal Property Tax
<input type="checkbox"/> Private Ruling Requests	<input type="checkbox"/> Property Tax	<input type="checkbox"/> R&D Tax Credits	<input type="checkbox"/> Reorganizations
<input type="checkbox"/> Report of Foreign Bank and Financial Accounts	<input type="checkbox"/> Sales & Use Tax	<input type="checkbox"/> Sales and Commodity Tax	<input type="checkbox"/> State and Local Tax (SALT)
<input type="checkbox"/> State Audit Defense	<input type="checkbox"/> Tangible Asset & Repair Studies	<input type="checkbox"/> Tax Accounting & Provision	<input type="checkbox"/> Tax Credit Transaction Consulting
<input type="checkbox"/> Tax Credits	<input type="checkbox"/> Tax Planning and Consulting	<input type="checkbox"/> Tax Reform	<input type="checkbox"/> Tax Research
<input type="checkbox"/> Tax-free Exchanges	<input type="checkbox"/> Tax-free Reorganizations	<input type="checkbox"/> Transfer Pricing	<input type="checkbox"/> Unrelated Business Income Tax (UBIT)
<input type="checkbox"/> Value Added Tax (VAT)	<input type="checkbox"/> Withholding Tax on Dividends & Interest		

Technology

<input type="checkbox"/> Accounting Software Consulting/Training	<input type="checkbox"/> CIO/CISO Services	<input type="checkbox"/> Cloud Services	<input type="checkbox"/> CRM Services
<input type="checkbox"/> Custom Software Development Services	<input type="checkbox"/> Cybersecurity & Information Security	<input type="checkbox"/> Cybersecurity & Technology Assessments	<input type="checkbox"/> Cybersecurity Education
<input type="checkbox"/> Data Analytics & Dashboarding	<input type="checkbox"/> Digital Transformation	<input type="checkbox"/> Disaster and Recovery Planning	<input type="checkbox"/> Email Solutions
<input type="checkbox"/> ERP Services	<input type="checkbox"/> Financial and Management Information System Consulting	<input type="checkbox"/> Help Desk Support	<input type="checkbox"/> IT Audit
<input type="checkbox"/> IT Consulting	<input type="checkbox"/> IT Internal Audits	<input type="checkbox"/> IT Risk Assessments	<input type="checkbox"/> IT Security
<input type="checkbox"/> Managed Information Systems	<input type="checkbox"/> Network Security	<input type="checkbox"/> Robotic Process Automation (RPA)	<input type="checkbox"/> Server Maintenance
<input type="checkbox"/> Software Consulting & Implementation	<input type="checkbox"/> Technology Risk Consulting		

Wealth Management/Family Office/Funds

<input type="checkbox"/> Family Office Services	<input type="checkbox"/> Fund Management	<input type="checkbox"/> Investment Advice	<input type="checkbox"/> Investment Management
<input type="checkbox"/> Personal Financial Planning	<input type="checkbox"/> Private Client Financial Concierge Services	<input type="checkbox"/> Retirement Planning/Solutions	<input type="checkbox"/> Succession Planning